

(1) Second and Final Account and Report of Successor Conservator, (2) Petition for Allowance of Attorney's Fees, for Reimbursement of Costs to Attorney and for (3) Discharge of Successor Conservator of the Estate

Age: 65	CHRIS WADE , successor conservator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Schedule C, Disbursements shows a charge of \$446.86 to Boot Barn but does not include the nature and purpose of the purchase. The Court may require more information.</p>	
	Account period: 01/01/2013 – 03/31/2014		
Cont. from	Accounting - \$276,930.17		
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$210,738.92		
<input checked="" type="checkbox"/> Verified	Ending POH - \$228,250.07		
<input type="checkbox"/> Inventory	Conservator - Waives		
<input type="checkbox"/> PTC	Attorney - \$9,705.00		
<input type="checkbox"/> Not.Cred.	(11.4 hours at \$250/hr for Accounting, 3.8 hours at \$250/hr for Bond, 14.7 hours at \$250 for Substituted Judgment, and 6.4 hours at \$250/hr for Veterans Administrations)		
<input checked="" type="checkbox"/> Notice of Hrg	Costs - \$896.00		
<input checked="" type="checkbox"/> Aff.Mail w/	(filing fees and certified copies)		
<input type="checkbox"/> Aff.Pub.	Current Bond is \$114,000.00		
<input type="checkbox"/> Sp.Ntc.	Petitioner prays for an Order:		
<input type="checkbox"/> Pers.Serv.	1. Approving, allowing and settling the First Account Current of Successor Conservator; and		
<input type="checkbox"/> Conf. Screen	2. Authorizing attorneys' fees and costs.		
<input type="checkbox"/> Letters	3. The Successor Conservator be discharged as Successor Conservator of the Estate		
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: LV
			Reviewed on: 05/23/2014
		Updates:	
		Recommendation:	
		File 1 - Wade	

Petition to Reduce Bond

			<p>DENNIS MAXWELL, Administrator with Will Annexed and bond of \$11,460,000.00, is Petitioner.</p> <p>Petitioner requests to reduce the bond to \$0 because all estate assets have been distributed pursuant to the "Order Settling First and Final Account and Report of Administrator; Allowing Compensation to Administrator, Guardian Ad Litem and Attorneys for Ordinary and Extraordinary Services; and for Final Distribution" filed 12-11-13.</p> <p>The only reason the estate will remain open is so that Petitioner can address an estate tax audit.</p> <p>There are no assets of any kind in the estate and no income will be incurred.</p> <p>The bond should be reduced to zero and the liability on the bond for future transactions will be reduced to zero.</p> <p>Petitioner requests that the Court order the liability of the existing bond be reduced to zero dollars and all other relief the Court considers proper.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Receipts have been filed for all distributions made pursuant to the final order.</p>
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 5-23-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2 - Coit</p>	

DOD: 8/25/2012	DELIA DE LA MORA , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states inventory and appraisals in the estate total \$2,401,634.47.	
<input type="checkbox"/> Aff.Sub.Wit.	The heirs of the estate are the decedent's three children, Rafael De La Mora, Francisco De La Mora and Fernando De La Mora.	
<input checked="" type="checkbox"/> Verified	When the estate began, all three children were minors. Rafael is now an adult.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	A prior preliminary distribution totaling \$300,000.00 was Ordered on 12/12/13. The preliminary distribution allowed \$100,000.00 to the Guardianship Estate of Rafael De La Mora, \$100,000.00 to the Guardianship Estate of Francisco De La Mora and the Guardianship Estate of Fernando De La Mora.	
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	This petition for the second preliminary distribution applies only to Rafael De La Mora. The property to be distributed is \$145,000.00 cash.	
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Although the estate is not in a condition to be closed, Petitioner believes that the preliminary distribution can be made without loss to creditors or injury to the estate or anyone interested in it. The total of the first and second preliminary distribution does not exceed 50% of the value of the estate.	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order	Petitioner prays for an Order that:	
<input type="checkbox"/> Aff. Posting	1. All acts and proceedings of Petitioner as Administrator be confirmed and approved.	
<input type="checkbox"/> Status Rpt	2. The preliminary distribution requested in the petition be granted.	
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/22/14
		Updates:
		Recommendation:
		File 3 – De La Mora

Petition for Preliminary Distribution

DOD: 8/25/2012	DELIA DE LA MORA , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.	<p>Petitioner states inventory and appraisals in the estate total \$2,199,572.83.</p> <p>The heirs of the estate are the decedent's five children, Rafael De La Mora, Francisco De La Mora, Fernando De La Mora, Michael Gillespie and Michaela Gillespie. When the estate began all the children were minors. Rafael is now an adult.</p> <p>This petition for a preliminary distribution applies only to Rafael De La Mora. The property to be distributed is \$145,000.00 cash.</p> <p>Although the estate is not in a condition to be closed, Petitioner believes that the preliminary distribution can be made without loss to creditors or injury to the estate or anyone interested in it. The total of the first and second preliminary distribution does not exceed 50% of the value of the estate.</p> <p>Petitioner prays for an Order that:</p> <p>3. All acts and proceedings of Petitioner as Administrator be confirmed and approved.</p> <p>4. The preliminary distribution requested in the petition be granted.</p>		
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail W/			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
		Reviewed by: KT	
		Reviewed on: 5/22/14	
		Updates:	
		Recommendation:	
		File 4 – De La Mora	

DOD: 9-21-12	ROSARIO R. FORESTIERE , Spouse and named Executor without bond, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The will is not self-proving. Petitioner has provided a Declaration from Marvin T. Helon pursuant to Probate Code §8221 attesting as to the handwriting of his father Marvin E. Helon, who was one of the subscribing witnesses, as well as a Declaration from Rosario Forestiere (Petitioner and spouse) attesting as to the handwriting of the decedent.</p> <p>Note: On 5-7-14, Andre Forestiere filed "Opposition to Petition to Administer Estate and to Remove and Disqualify Administrator/Executor and to Appoint a New Executor." This was filed as a new matter (rather than an opposition to this petition) and was therefore set for hearing separately on 6-19-14.</p>
Cont from 042814	Petitioner was originally appointed as Administrator with Limited IAEA without bond on 1-3-13 and Letters issued on 1-7-13	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Petitioner now requests that the decedent's will dated 8-5-65 be admitted to probate and that he be appointed as Executor pursuant to the will.	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w	
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Full IAEA – ok	
<input type="checkbox"/> Pers.Serv.	Will dated 8-5-65	
<input type="checkbox"/> Conf. Screen	Residence: Fresno	
<input checked="" type="checkbox"/> Letters	Publication: Petitioner references publication filed 11-30-12	
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Value of Estate:	
<input type="checkbox"/> Video Receipt	<ul style="list-style-type: none"> I&A filed 3-18-13 indicates a total estate value of \$122,000.00 consisting of real property and a vehicle. Order Confirming Sale of Real Property filed 1-3-14 indicates that the real property was sold for \$175,000.00. 	
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice	Note: Page 5C of this calendar is a status hearing set for filing the receipt for blocked account.	
		Reviewed by: skc
		Reviewed on: 5-22-14
		Updates: 5-27-14
		Recommendation:
		File 5A - Forestiere

DOD: 9-21-12	<p>ROSARIO R. FORESTIERE, Spouse, was appointed as Administrator with Limited IAEA without bond on 1-3-13 and Letters issued on 1-7-13.</p> <p>At hearing on 1-3-13, the Court set this status hearing for the filing of the first account or petition for final distribution.</p> <p>Status Report filed 3-11-14 by Attorney Wright states that a will has now been discovered and a Petition for Probate of Will is in process. The assets of the estate include the decedent's home, personal vehicle, and personal effects. On 12-31-13, the Court approved the sale of the residence and it is currently in escrow. The estate is not in a condition to be closed until the will has been admitted and escrow has closed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petitioner states the estate is not in a condition to be closed at this time because a will has been discovered and a Petition for Probate of Will is in process. In addition, escrow on the sale of the residence has not yet closed. The Court may require additional information as to the anticipated time frame for close of escrow, filing the petition for probate of will, and then closing the estate. The Administrator was previously appointed with Limited IAEA without bond. At this time, since the residence has sold for a purchase price of \$175,000.00, the Court may require bond or blocked account going forward. <p><i>Note: The Petition for Probate of Will filed 3-19-14 is Page 5A of this calendar.</i></p>
Cont. from 032114, 042814		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 5-22-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5B – Forestiere</p>

	ROSARIO R. FORESTIERE , Spouse, was appointed as Administrator with Limited IAEA without bond on 1-3-13 and Letters issued on 1-7-13.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need receipt for blocked account (MC-356).</p>
	On 1-3-14, the Court confirmed the sale of real property at \$175,000.00.	
Cont from 052814	At the status hearing on 3-21-14 regarding the filing of the first account or petition for final distribution, it was noted that the estate is not in a condition to close at this time because a will has been found and the Administrator would be filing a petition to admit the will to probate. See Page 3A. The Court ordered the proceeds from the sale of the property deposited into a blocked account and set this status hearing for filing of the receipt.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 5-22-14
		Updates:
		Recommendation:
		File 5C - Forestiere

Page 2**Petitioner states Ms. Gingold has failed to (Continued):**

- Inventory and appraise any of the assets;
- Maintain the real property located at 5887 W. San Gabriel in Fresno;
- Provide any accounting, including all bank statements, receipts, and disbursement pursuant to Probate Code § 17200(b)(7)(B) and §§ 16062 and 16063;
- Petitioner alleges that Ms. Gingold has lived in the property without payment of rent, has used trust assets to pay for utilities, cable, and other items for her sole personal use;
- Ms. Gingold has failed to assemble personal property, which is depreciating in value, in order to auction or sell, or provide notice to beneficiaries as to whether said personal property should be distributed;
- Ms. Gingold has failed to provide any information re life insurance policies, final expense bills, or other related financial information;
- Ms. Gingold has failed to file the appropriate income tax returns, estate tax returns, and other tax reporting requirements for the trust on a timely basis; and
- Ms. Gingold has exhibit hostility and impairing the administration of the trust, which is reflected as grounds for removal pursuant to Probate Code § 15642(b)(3).

Additional information:

- The Trustor of the **EMELIA C. CALNEK TRUST** was also known as **EMELIA CHARLOTTE JENNRICH** (see death certificate).
- The real property asset of the estate located at 5887 W. San Gabriel in Fresno refers to "**EMILIA C. CALNEK JENNRICH, Trustee of the EMILIA C. CALNEK TRUST**" (see Grant Deed).
- The **Sixth (6th) Amendment**, attached as Exhibit C, dated 6-28-07 nominates Petitioner and Ms. Gingold as Co-Trustees. A letter from Attorney Steve H. Murphy dated 6-8-10 confirms.
- There are eight **(8) beneficiaries**. Petitioner lists names, but not relationships.
- Declaration of No Service filed 11-25-13 indicates that a process server made numerous attempts to serve Ms. Gingold at the San Gabriel address; however, no one answers the door. Declaration filed 12-10-13 indicates additional attempts to serve Ms. Gingold at two other addresses in Mariposa, CA.

Petitioner requests that:

- 1. The Court remove the Successor Co-Trustee PAMELYN SHARLEY GINGOLD from office and appoint ANNE LAWRENCE as the sole Successor Trustee of the EMELIA C. CALNEK TRUST dated December 19, 1995;**
- 2. The Court order PAMELYN SHARLEY GINGOLD to provide a full accounting from the date of death of the decedent of 1-28-10 to the date of her removal;**
- 3. The Court order Attorney's fees of the Petitioner to be paid in an amount to be determined;**
- 4. The Court make all further and proper orders.**

SEE ADDITIONAL PAGES

Dept. 303, 9:00 a.m. Wednesday, May 28 2014

Page 3

Objection filed 12-9-13 by Co-Trustee Pamelyn S. Ginsold admits certain facts as stated above regarding the name of the Trustor, the real property as an asset of the trust, and the nomination of Petitioner and Objector as co-trustees; however, Objector denies the allegations of Petitioner in Paragraph 6 and all subparagraphs, except as follows:

Ms. Gingold denies residing at the San Gabriel property, and denies that Jeremiah Gingold and Serena Katherine Gingold have ever resided there. Petitioner knew they do not reside there, yet served documents at that address to avoid providing actual notice of these proceedings to Ms. Gingold, Jeremiah, and Serena Gingold. Additionally, Ms. Gingold is informed and believes and thereon alleges that the decedent's surviving spouse, **EDWARD W. JENNRICH**, is entitled to notice of these proceedings as he may have a beneficial interest in the San Gabriel property under the terms of the Sixth Amendment.

Ms. Gingold states: She and Petitioner are the daughters of the decedent. Decedent was survived by her spouse, Edward W. Jenrich, whom Ms. Gingold is informed, believes, and thereon alleges now resides in Pasadena California, by her two daughters, Ms. Gingold and Petitioner, her son Peter J. Deyell, and five grandchildren. All of these individuals are named beneficiaries under the Sixth Amendment.

Decedent was also survived by a son, David A. R. Deyell, but he is not a beneficiary under the Sixth Amendment. He also appears to be disinherited under the terms of Decedent's will dated 3-16-00 (attached).

Following Decedent's death in Jan 2010, Ms. Gingold and Petitioner gathered Decedent's estate planning documents and Petitioner took them to her home in Colorado. Petitioner therefore had the 1995 Trust instrument and all amendments thereto in her possession. Ms. Gingold thus denies Petitioner's allegation that she withheld copies from Petitioner or any other beneficiary.

Ms. Gingold states neither she nor Petitioner retained legal counsel to advise them regarding administration of the trust. Ms. Gingold understood that as a co-trustee, she was to maintain the San Gabriel residence and pay expenses related to the maintenance and assets of the trust, and has done so. The decedent's final expenses were paid as well as ongoing expenses related to the real property. Ms. Gingold has supervised the upkeep of the property, maintained a trust checking account with Petitioner as co-trustees, which Petitioner has access to, and has made distributions to beneficiaries according to the Sixth Amendment. She prepared an inventory of the contents of the house and obtained appraisal of the contents and discussed with Petitioner. Petitioner at all times consented to Ms. Gingold's handling the responsibilities and never voiced any objection or disagreement. Rather, Petitioner expressed her preference that Ms. Gingold undertake these responsibilities, as she resides in Colorado, and Ms. Gingold, a resident of Mariposa, was better situated to handle administration of Fresno assets.

SEE ADDITIONAL PAGES

Page 4

Objector states (Continued):

To the extent that any administrative tasks went undone, Ms. Gingold was unaware of such tasks. She was not represented by counsel. Petitioner, on the other hand, was employed as a paralegal for a law firm and is now a clerk of the Dolores County Court in Colorado. Petitioner represented that she would determine and inform Ms. Gingold of any and all tasks of a legal nature required for administration. Aside from the responsibilities that Ms. Gingold has undertaken (bill pay, etc.), Petitioner never identified any tasks for her to complete.

Ms. Gingold submits that Petitioner had an equal responsibility to complete the administrative tasks, and to the extent there is any fault on the part of Ms. Gingold, which she denies, Petitioner is equally at fault. Petitioner has not set forth sufficient grounds to justify Ms. Gingold's removal, an order compelling her to account, or an award of attorney's fees.

Objector requests that the Court deny each and every claim for relief in the Petition; award Objector her costs incurred in this matter; and order any and all further relief the Court deems just and proper.

Status Report filed 2-5-14 by Attorney Burnside (for Objector) provides details of the dispute including communications, distributions, and account access, and states the balance presently remaining in the trust checking account is approx. \$15,000.00, and the remaining property on hand includes the San Gabriel St. residence, the funds in the checking account, and the various personal property items in the home.

Status Report filed 2-10-14 by Attorney Bagdasarian (for Petitioner) states Gingold has failed to provide accounting or any information concerning the distribution of \$114,000 or for whose benefit, leading to the conclusion that the funds have been misappropriated. The real property has been allowed to deteriorate due to Gingold's failure to arrange maintenance; thereby resulting in a loss to the trust estate. Based on the lack of cooperation in providing an accounting or information concerning distributions, Petitioner again requests that Gingold be removed as co-trustee and all assets be turned over to Petitioner in order to complete the trust administration.

Supplemental Status Report filed 2-11-14 by Attorney Burnside (for Objector) provides additional details of distributions and the approximate balance in each beneficiary's account. Ms. Gingold disputes that the property has deteriorated and caused loss to the estate, and further asserts that Ms. Lawrence has made no effort to assist with maintenance. Trust administration is presently moving forward, and Ms. Gingold is consulting with another real estate agent for listing the property. Attorney Burnside is waiting to hear from Mr. Bagdasarian re his client's wish for disposition of the personal property remaining on hand – can it be sold via estate sale or distributed to beneficiaries or disposed of in some other manner?

Note: Notice of Settlement filed 5-20-14 indicates that the parties have reached a settlement regarding this petition.

However, no settlement agreement or request for dismissal has been filed; therefore, the petition is still pending. Also, the account filed 4-9-14 at Page B is also pending.

Petition for Settlement of First Account of the Emelia C. Calnek Trust and the Three Minors Accounts by Co-Trustee, Pamelyn Sharley Gingold

DOD: 1-29-10	PAMELYN S. GINGOLD , Co-Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Trust Acct period: 1-28-10 through 3-18-14	
	Accounting: \$527,907.76	
	Beginning POH: \$524,406.64	
	Ending POH: \$154,656.11	
	(\$14,656.11 cash plus real property)	
<input type="checkbox"/> Aff.Sub.Wit.	Minors' Acct Period: 4-26-11 through 2-11-14	
<input checked="" type="checkbox"/> Verified	<u>Sophia Maureen Lawrence:</u>	
<input type="checkbox"/> Inventory	Accounting: \$36,239.93	
<input type="checkbox"/> PTC	Beginning POH: \$0.00	
<input type="checkbox"/> Not.Cred.	Ending POH: \$36,239.93	
<input checked="" type="checkbox"/> Notice of Hrg	<u>Jeremy Michael Lawrence:</u>	
<input checked="" type="checkbox"/> Aff.Mail	Accounting: \$36,180.23	
<input type="checkbox"/> Aff.Pub.	Beginning POH: \$0.00	
<input type="checkbox"/> Sp.Ntc.	Ending POH: \$35,180.23	
<input type="checkbox"/> Pers.Serv.	<u>Sarah Lawrence:</u>	
<input type="checkbox"/> Conf. Screen	Accounting: \$36,180.24	
<input type="checkbox"/> Letters	Beginning POH: \$0.00	
<input type="checkbox"/> Duties/Supp	Ending POH: \$35,180.24	
<input type="checkbox"/> Objections	Petitioner is waiving compensation to her as co-trustee for this account period. Petitioner states \$5,000.00 was paid to her attorneys Dowling Aaron Incorporated.	
<input type="checkbox"/> Video Receipt	Distributions were made in the allocations specified under the paragraph entitled "Allocation of Trust Assets" as set forth in the 6 th Amendment to the Trust, except for the additional distribution to Peter Deyell, which was discussed with Co-Trustee Anne Lawrence. The Co-Trustees agreed that distributions to the remaining beneficiaries would be done at a later date to have enough money to ready the house for sale.	
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order	Petitioner states that Peter Deyell was listed on the Bank of the West account as a co-trustee with Pamelyn Gingold based upon ha change that Emelia Calnek was going to make to the trust after the 6 th amendment. However, no further amendments were found. After Emelia's death, Peter communicated to Bank of the West that he was not a co-trustee and wrote a letter to the bank resigning.	
<input type="checkbox"/> Aff. Posting	Petitioner prays for order and judgment as follows:	
<input type="checkbox"/> Status Rpt	1. Settling and allowing the trust account and minors' accounts as filed;	
<input type="checkbox"/> UCCJEA	2. Ratifying, confirming and approving all acts and transactions of Petitioner as Co-Trustee;	
<input type="checkbox"/> Citation	3. Ratifying and approving the attorney's fees already paid as set forth above.	
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 5-23-14
		Updates:
		Recommendation:
		File 6B

Atty Amador, Catherine A., of Pascuzzi, Moore & Stoker (for Petitioner)
 Atty Boyett, Deborah K., of Walter & Wilhelm Law Group (Court-appointed for Conservatee)

Petition for Leave to Obtain a Reverse Mortgage on Property Owned in Part by Conservatee

Age: 84 years	<p>JOHN PEREHODUK, brother and Conservator appointed on 2/4/2014, is Petitioner.</p> <p>Petitioner seeks leave to obtain a reverse mortgage on real property owned in joint tenancy by the Conservatee, the Conservator John Perekhoduk, and Conservator's wife, Marion Perekhoduk, based upon the following:</p> <ul style="list-style-type: none"> • Petitioner, his wife, and the Conservatee are joint owners of a modest house on Jackson Avenue in Fresno, and they have owned the house and resided there together for more than 20 years; • Each contributed 1/3rd to the expenses of the home from their various pensions and social security income, and the arrangement worked well for all three; • They are all of modest means living on fixed incomes; • Conservatee was diagnosed with Parkinson's disease in early September 2012, and then suffered a fairly serious heart attack later that same month; • Since then she has resided in a skilled nursing facility due to her fragile medical state; more recently she has also had problems with steadily advancing dementia; • Orders were issued establishing a Conservatorship on 2/4/2014; independent counsel was appointed for Conservatee, and Attorney Boyett continues to serve in that capacity; <p align="center">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Local Rule 7.1.1 (C) provides that when a petition or other request for relief is presented to the Court, the Probate Code section that allows the requested relief must appear below the title of the pleading. The instant <i>Petition</i> does not but should include a Probate Code section in the pleading caption; thus, it is unclear whether the <i>Petition</i> is brought under Probate Code § 2580 for substituted judgment, and if so, which subsection the <i>Petition</i> relies upon for making the request that the Court allow a reverse mortgage of Conservatee's 1/3 interest in the real property.</p> <p align="center">~Please see additional page~</p>
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail W/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		<p>Reviewed by: LEG</p> <p>Reviewed on: 5/23/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 - Perekhoduk</p>

Petitioner states, continued:

- Since the Conservatee's hospitalization following the heart attack, essentially all of her financial resources have been directed toward paying for her care and her residence in a skilled nursing facility; she does qualify for Medi-Cal, which leaves just **\$35.00** per month to be used for her personal needs;
- Conservator and his wife cannot afford to remain in the Jackson Avenue home without Conservatee's 1/3 contribution toward the basic expenses of the home, including property taxes, insurance, basic telephone service, minimal yard care and basic maintenance;
- The home is their only asset; the same is true for Conservatee; therefore, Conservator and his wife are faced with two options:
 1. They can sell the home and take their share of the proceeds for their living expenses;
 2. Or they can seek a reverse mortgage and slowly use the equity in the home to support their residence there;
- If the home is sold, Conservatee would receive her 1/3 share of the sale proceeds in a lump sum, and this would automatically eliminate her eligibility for Medi-Cal until such time as those monies were spent down for her care; then she would be required to re-apply for Medi-Cal benefits and there could be an interruption in her ability to remain in the skilled nursing facility where she resides; Conservator believes this would not be in Conservatee's best interest;
- Alternatively, if the reverse mortgage approach is used, Conservator could manage the distribution of funds from the home's equity such that Conservatee's 1/3 share would be carefully monitored and used to pay her share of the basic expenses for the house so that her Conservatorship account balance never exceeds **\$2,000.00**; this would preserve her eligibility for Medi-Cal; it would also provide funds for Conservatee's personal needs beyond the minimal **\$35.00** given to her at present by the Medi-Cal system; this would also relieve Conservator from the need to supplement her personal care needs from his own limited means.

Petitioner requests an Order authorizing Conservator to obtain a reverse mortgage on the real property on Jackson Avenue on behalf of himself, his wife, and Conservatee, the proceeds of which shall be managed so as to protect Conservatee's eligibility for Medi-Cal benefits at all times.

Note for background: Declaration of Deborah K. Boyett, Court-Appointed Attorney for Conservatee, Concerning Request for Orders Authorizing Independent Exercise of Powers to Deal with Real Property filed 1/31/2014 states she opposes Petitioner's request [made at the time of the initial establishment of the Conservatorship] to obtain a reverse mortgage on the residential property owned jointly by Petitioner and his wife and the proposed Conservatee. Declarant does not support the plan of obtaining a reverse mortgage because the income received therefrom could potentially disqualify the proposed Conservatee from receiving or continuing to receive benefits that pay for her board and care at Wish I Ah Care Center in Auberry. Therefore, Ms. Boyett does not believe that a reverse mortgage on the residence is in the best interests of the proposed Conservatee. She has discussed with Attorney Amador the possible options that would allow the proposed Conservatee to have a source of income, including from a reverse mortgage, but that would not disqualify the proposed Conservatee from receiving government benefits for her care and support.

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

2. *Proof of Bond* filed 2/26/2014 shows current bond is **\$20,750.00**. Probate Code § 2320.1 provides that when the Conservator has knowledge of facts from which the Conservator knows or should know that the bond posted is less than the amount required under § 2320, the Conservator and the attorney shall make an . . . application for an order increasing the bond to the amount required under section § 2320. The *Petition* provides no information regarding the value of the Conservatee's 1/3 share in the real property, nor does the *Petition* make a request that the bond be increased based upon the liquid assets that will belong to the Conservatee following the Conservator's obtaining a reverse mortgage, but that Conservator apparently proposes to hold outside of the Conservatorship estate (except for **\$2,000.00** so as not to disqualify her for benefits.) Need information regarding the value of Conservatee's share, and the Conservator's plan for protecting the Conservatee's share of liquid assets if the Court allows them to be held outside the Conservatorship estate as proposed.
3. *Petition* does not include information regarding whether the Conservator's intent to seek a reverse mortgage on the Conservatee's 1/3 ownership interest in the real property was discussed with the Conservatee and whether the Conservatee supports or is opposed to obtaining a reverse mortgage, which can be analogized to an action for sale of the Conservatee's former personal residence, and which the Court may require to be conducted according to the provisions of Probate Code § 2540(b).

		<p>WAYNE L. BANDY, spouse, ARTHUR OSTRANDER, friend (CPA), and TERRY NOVAK, friend (Caregiver), are Petitioners and request appointment as Co-Conservators of the Person and Estate with independent powers under Probate Code §2590 (not specified).</p> <p>Voting rights <u>NOT</u> affected</p> <p>A Capacity Declaration was filed on 4-1-14.</p> <p>Estimated Value of Estate: Personal property: \$10,000.00 Real property: \$237,000.00</p> <p>Petitioners state Mrs. Bandy suffered from cancer of the neck and now suffers from skin cancer. Treatment has affected her speech and her writing. She is restricted to a wheelchair and requires total care. She is coherent and understands what is being told to her, but it is difficult to understand her due to her speech impairment.</p> <p>Court Investigator Jennifer Daniel filed a report on 4-30-14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 4-10-14.</p> <p>1. The petition requests independent powers under Probate Code §2590; however, the specific powers requested are not detailed per Local Rule 7.15.2. Need clarification. – <u>See below.</u></p> <p>Minute Order 5-7-14 indicates that the only power requested is power to change the trust. Examiner notes that this power does not fall under Probate Code §2590; rather, separate noticed petition for substituted judgment under §2580 is required.</p> <p><u>Note:</u> Pursuant to #1 above, the petition requested unspecified powers under Probate Code §2590. Pursuant to the Minute Order of 5-7-14, the power requested is the power to change the trust. Examiner Notes previously noted that this does not fall under §2590; rather, separate noticed petition for substituted judgment under §2580 is required.</p> <p><u>Supplement to Petition filed 5-23-14</u> states Petitioners are requesting the power under §2580 to change the terms of the parties joint trust which leaves property to their son Mark Bandy and grandson James Bandy whom both Mary Louise Bandy and Wayne L. Bandy desire to disinherit.</p> <p>Examiner notes that the request is not verified and does not include any of the details required under Probate Code §2580 for the Court to make an order for substituted judgment. The Court may require a separate noticed petition pursuant to applicable law.</p> <p>2. Petitioners request appointment without bond; however, pursuant to Probate Code §2320 and Cal. Rules of Court 7.207, bond is required for all conservators of the estate, including cost of recovery. Bond should be at least \$11,000.00.</p> <p>3. Need Video Receipt per Local Rule 7.15.8.A for all petitioners.</p> <p><u>Note:</u> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Wednesday 7-16-14 for filing of bond • Wednesday 10-8-14 for Inventory and Appraisal • Wednesday 10-7-15 for filing the first account. <p>If the foregoing items are on file, the status hearings may be taken off calendar.</p>	
Cont from 050714, 051414				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 5-22-14		
		Updates: 5-23-14		
		Recommendation:		
		File 8 - Bandy		

Petition for Determination of Entitlement to Personal Property in the Possession of Another and for Double Damages

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued to July 8, 2014</u> at the request of the attorney.</p>
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: KT
		Reviewed on: 5/23/14
		Updates:
		Recommendation:
		File 9 - Schmit

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution [Prob. C. 12200, et seq.]

DOD: 12-1-02	RICHARD ALLEN CANADA , Son, was appointed Administrator with Full IAEA with bond of \$17,000.00 on 5-4-04.	NEEDS/PROBLEMS/COMMENTS:
		<u>Minute Order 4-12-13:</u> Counsel informs the Court that Mr. Canada has agreed to work with him with respect to this matter.
	Bond of \$17,000.00 was filed and Letters issued on 5-7-04.	<u>Minute Order 6-21-13:</u> No appearances. The Court removes Richard Canada as the administrator and appoints the Public Administrator as the personal representative. Continued to 9-20-13.
Cont from 041213, 062113, 092013, 120613, 022714	Inventory and Appraisal filed 7-6-04 indicates a total estate value of \$90,000.00 consisting of real property located at 2365 South Lily in Fresno.	<u>Minute Order 9-20-13:</u> Ms. Kruthers informs the Court that she will be filing a petition for surcharge and will provide notice to the bonding company at that time. The Court sets the matter for an Order to Show Cause on 12/6/13 regarding failure to appear and imposition of sanctions in the amount of \$500.00 as to Richard Canada. Richard Canada is ordered to be personally present on 12/6/13. Continued to: 12/6/13 at 09:00a.m. in Dept 303. Set on: 12/6/13 at 09:00a.m. in Dept 303 for: Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$500.00
Aff.Sub.Wit.	On 2-25-13, Attorney C. Michael Farmer filed a Notice of Change of Address, which prompted review of the status of this case.	1. Need first account or petition for final distribution <u>or current status report.</u>
Verified	On 3-1-13, the Court set status hearing for 4-12-13 for failure to file a first account or petition for final distribution.	2. Need proof of service of Notice of Hearing with a copy of the status report on parties that have requested special notice pursuant to Probate Code §1252.
Inventory	The matter was continued to 6-21-13. On that date, there were no appearances. The Court removed Mr. Canada and appointed the FRESNO COUNTY PUBLIC ADMINISTRATOR.	<u>Note:</u> The file indicates that the decedent left a spouse who relocated to Lapu Lapu City, Philippines, after the decedent's death, and two adult children, including the Administrator, who reside in Fresno.
PTC	Status Report filed 9-9-13 states the Public Administrator has attempted to contact the former administrator by contacting his daughter and the attorney; however, has not been able to make contact. The former administrator's former attorney, C. Michael Farmer, reported that the former administrator may have distributed the proceeds from the sale of the house, the only asset, to him and his sister. If so, the surviving spouse did not receive her 1/3 share, and none of the several creditors were paid. The Public Administrator will continue to attempt to find the former administrator, and requests the Court set an Order to Show Cause requiring Mr. Canada to personally appear, and that this matter be set out for at least 60 days to allow time to investigate.	<u>Note:</u> There have been numerous creditor's claims filed in this estate totaling \$11,748.70.
Not.Cred.		Reviewed by: skc
Notice of Hrg		Reviewed on: 5-22-14
Aff.Mail		Updates:
Aff.Pub.		Recommendation:
Sp.Ntc.		File 10A - Canada
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Status Hearing Re: Petition for Surcharge

	<p>RICHARD ALLEN CANADA, Son, was appointed Administrator with Full IAEA with bond of \$17,000.00 on 5-4-04.</p> <p>Bond of \$17,000.00 was filed and Letters issued on 5-7-04.</p> <p>Inventory and Appraisal filed 7-6-04 indicates a total estate value of \$90,000.00 consisting of real property located at 2365 South Lily in Fresno.</p> <p>On 2-25-13, Attorney C. Michael Farmer filed a Notice of Change of Address, which prompted review of the status of this case.</p> <p>On 3-1-13, the Court set status hearing for 4-12-13 for failure to file a first account or petition for final distribution.</p> <p>The matter was continued to 6-21-13. On that date, there were no appearances. The Court removed Mr. Canada and appointed the FRESNO COUNTY PUBLIC ADMINISTRATOR.</p> <p>The status hearing for failure to file, etc., (Page 10A) has been continued numerous times. On 2-27-14, the Court set this status hearing re Petition for Surcharge.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 5-22-14
		Updates:
		Recommendation:
		File 10C - Canada

Status Hearing Re: Filing of Petition for Final Distribution

DOD: 06/22/12	<p>KAREN K. WILLIAMS, daughter, was appointed as Administrator with limited IAEA and funds to be deposited into a blocked account on 06/04/13. Letters of Administration were issued on 06/10/13.</p> <p>Inventory & Appraisal, Final – filed 12/09/13 - \$179,919.84</p> <p>Minute Order from hearing on 03/28/14 set this matter for status regarding filing the Accounting/Report of Administrator and Petition for Final Distribution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Accounting/Report of Administrator and Petition for Final Distribution.</p>	
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202 Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			<p>Reviewed by: JF</p> <p>Reviewed on: 05/23/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Williams</p>

	DEBRA PASLEY , mother, was appointed as Conservator of the Person and Estate pursuant to Order filed 3-5-13 with bond of \$15,000.00. Letters issued on 3-28-13.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need status of establishing conservatorship of the person and estate (or equivalent) in Virginia.</p>
	I&A filed 6-5-13 indicated cash of \$13,438.31.	
Cont from 032814	On 1-28-14, the Conservator filed a Post-Move Notice of Change of Residence of Conservatee to Moneta, VA.	
Aff.Sub.Wit.	On 2-5-14, the Court granted the Conservator's Petition to Fix Residence Outside the State of California to Moneta, Virginia and set this status hearing for filing conservatorship of the person and estate (or equivalent) in Virginia.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 5-22-14
		Updates:
		Recommendation:
		File 12 – Pasley

<p>DOD: 10-7-12</p> <hr/> <hr/> <hr/> <p>Cont. from 111313, 112013, 010814, 022614,</p> <p>Aff.Sub.Wit.</p> <p>Verified</p> <p>Inventory</p> <p>PTC</p> <p>Not.Cred.</p> <p>Notice of Hrg</p> <p>Aff.Mail</p> <p>Aff.Pub.</p> <p>Sp.Ntc.</p> <p>Pers.Serv.</p> <p>Conf. Screen</p> <p>Letters</p> <p>Duties/Supp</p> <p>Objections</p> <p>Video Receipt</p> <p>CI Report</p> <p>9202</p> <p>Order</p> <p>Aff. Posting</p> <p>Status Rpt</p> <p>UCCJEA</p> <p>Citation</p> <p>FTB Notice</p>	<p>JOAN ST. LOUIS, Spouse, filed Petition for Assumption of Law Practice of David St. Louis on 9-6-13.</p> <p>Background: Mrs. St. Louis' petition requested:</p> <ol style="list-style-type: none"> 1) That the Court assume jurisdiction over the law practice of David J. St. Louis and appoint attorney PAUL T. CHAMBERS to represent and assist the Court in assuming jurisdiction; 2) Allow Mr. Chambers to appoint himself as receiver and take possession and control of any and all bank accounts related to Mr. St. Louis' law practice, including the attorney-client trust account which contained \$54,502.09 at 3-31-13; 3) Coordinate with Allison St. Louis, former legal secretary, to determine the clients entitled to funds and the amounts each is owed; 4) Upon determining the recipients and the amounts owed, that Mr. Chambers be allowed to issue checks to the recipients without further court order; 5) Specifically, that Mr. Chambers be allowed, without further Court order, to issue checks from a certain estate account (John K. Shirin Estate) to those recipients entitled thereto; and 6) Upon completion, provided accounting. <p>Non-Opposition to Petition was filed 9-30-13 by the State Bar of California.</p> <p>A Creditor's Claim and Request for Special Notice was filed 9-30-13 by Attorney J. Patrick Sullivan, who represents Walter Wentz, Creditor.</p> <p>Limited Opposition to Petition was filed 10-9-13 by BIANCA SORIA. Ms. Soria states she was a client of Mr. St. Louis, who was wired \$65,000.00 in connection with a settlement. Ms. Soria requested that as a condition to granting the petition, that the Court direct Mr. Chambers to distribute the funds to her, or to post appropriate bond.</p> <p>At hearing on 10-16-13, the Court granted the petition with additional orders and set this status hearing. See Page 2 for specifics.</p> <p>Subsequent to the hearing, both attorneys David Roberts and Donald Cram submitted competing proposed orders.</p> <p>Therefore, the Court will address the competing proposed orders at this status hearing.</p> <p style="text-align: center;">SEE ADDITIONAL PAGES</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Continued from 11/13/13, 11/20/13, 1/8/14, 2/26/14</p> <p>As of 3-25-14, a bond has been filed; however, no status report has been filed.</p> <p>Note: Page 13B is the status hearing for filing of the accounting.</p> <hr/> <p>Reviewed by: skc</p> <hr/> <p>Reviewed on: 5-22-14</p> <hr/> <p>Updates:</p> <hr/> <p>Recommendation:</p> <p>File 13A – St. Louis</p>
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Page 2

Minute Order 10-16-13: Mr. Cram is appearing via CourtCall on behalf of Bianca Soria. The Court accepts Mr. Roberts representation that Attorney Timothy Magill has been given notice. The Court finds that Patrick James' client has been properly served. The Court will allow the interlineation under 9764. The Court grants the petition and waives bond. The Court orders that the \$41,155.89 be paid within 30 days. The Court notes that there are no funds to pay Attorney Chambers and he is acting in pro bono. Matter set for Status Hearing on 11/13/13. If everything is completed by 11/13/13, no appearances will be necessary. Set on 11/13/13 at 9am in Dept 303 for Status Hearing. Additional hearing dates 3/6/14 at 9am Dept 303 for Status Re Accounting; Petition is granted; Order to be signed ex parte.

Attorney David A. Roberts submitted a proposed Order that contains orders as follows:

1. Granting the petition that the Court assume jurisdiction over the law practice, including, but not limited to, dispersing [sic] funds held in the attorney-client trust account;
2. Appointing Paul T. Chambers to represent and assist the Court in assuming jurisdiction over the law practice without bond and shall receive no compensation;
3. That Mr. Chambers coordinate with Allison St. Louis to determine the clients entitled to files, documentation, and/or funds and the amounts each is owed;
4. That the amount that Mr. Chambers finds due to Ms. Soria shall be paid within 30 days from the entry of this order without further Court order;
5. That Mr. Chambers be allowed to appoint himself receiver and take possession of the various accounts and have signature power over such accounts, including that certain account fbo John K. Shirin or his heirs;
6. That after determining the recipients of the files, documents, and money, and the amount thereof, that Mr. Chambers is given the authority to disburse such without further Court order;
7. That Mr. Chambers is authorized without further Court order to issue checks from the John K. Shirin account to those recipients entitled thereto;
8. That upon completing the foregoing tasks, Mr. Chambers provide an accounting, upon approval of which he shall be discharged; and
9. That Mr. Chambers inform the Court of any other action taken as the Court's representative;
10. Setting hearing for approval of the final account on 3-6-14.

Attorney Donald H. Cram submitted an Alternate proposed Order that includes, in addition to the above orders, that Mr. Chambers shall disburse no less than \$41,155.89 to Ms. Soria within 30 days without further Court order.

Note: Per Minute Order 2-26-14, bond of \$47,000.00 was required. Bond was filed 3-17-14. No further status report or accounting has been filed.

Note: The Court had originally set status hearing for 3-6-14 for the filing of the accounting. On 3-6-14, that status hearing was continued with this status hearing. See Page 13B.

Note: An Amended Order was signed 5-14-14.

Petition for Final Distribution on Waiver of Accounting

DOD: 1/11/13	NORA LEE KENNEDY SHOCK , Executor, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Marjorie Shock Webb b. Clifford Lee Shock, Jr. c. Carol Lee Purgason d. Cheryl Ann Shock e. Sheila Ann Shock Zamora 3. Need waiver of account from: <ol style="list-style-type: none"> f. Marjorie Shock Webb g. Clifford Lee Shock, Jr. h. Carol Lee Purgason i. Cheryl Ann Shock j. Sheila Ann Shock Zamora 4. Notice to the Franchise Tax Board was mailed on 3/11/14. 5. Order does not comply with Local Rule 7.6. Monetary distributions must be stated in dollars and not as percentages of the estate. 	
	Need waivers of accounting		
Cont. from	I & A - \$176,000.00		
<input type="checkbox"/> Aff.Sub.Wit.	POH - \$161,177.68		
<input checked="" type="checkbox"/> Verified	Executor - waives		
<input checked="" type="checkbox"/> Inventory			
<input checked="" type="checkbox"/> PTC	Distribution pursuant to Decedent's Will is to:		
<input checked="" type="checkbox"/> Not.Cred.	Nora Kennedy Shock - \$26,696.28 and 1/6 of the furniture, furnishings and personal effects.		
<input type="checkbox"/> Notice of Hrg			
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.	Marjorie Shock Webb- \$26,696.28 and 1/6 of the furniture, furnishings and personal effects.		
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen	Clifford Lee Shock, Jr. - \$26,696.28 and 1/6 of the furniture, furnishings and personal effects.		
<input checked="" type="checkbox"/> Letters	5/13/13		
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections	Carol Lee Purgason- \$26,696.28 and 1/6 of the furniture, furnishings and personal effects.		
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report	Cheryl Ann Shock- \$26,696.28 and 1/6 of the furniture, furnishings and personal effects.		
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting	Sheila Ann Shock Zamora- \$26,696.28 and 1/6 of the furniture, furnishings and personal effects.		
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice			
			Reviewed by:
			Reviewed on:
		Updates:	
		Recommendation:	
		File 14 - Kennedy	

Andrea, 2	<u>NO TEMPORARY IN PLACE; TEMPORARY DENIED ON 04/07/14 DUE TO NO APPEARANCES AT THE HEARING</u>		NEEDS/PROBLEMS/COMMENTS:
Allen-Michael Age: 11 mos.	DOLORES GOMEZ SAENZ , paternal grandmother, is Petitioner.		
	Father: ALLEN-MICHAEL ALANIZ Mother: CARLA ALANIZ		
Cont. from	Paternal grandfather: JOHNNY ALANIZ, SR.		
Aff.Sub.Wit.	Maternal grandparents: NOT STATED		
<input checked="" type="checkbox"/> Verified	Petitioner alleges that the father is in jail and the mother has mental health issues. She has taken the children out all night with her while she drinks.		
Inventory	Petitioner states that she has a safe home and the children are clean, fed and healthy in her home.		
PTC			
Not.Cred.			
Notice of Hrg <input type="checkbox"/>	Court Investigator Dina Calvillo filed a report on 05/13/14.		
Aff.Mail <input checked="" type="checkbox"/>			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv. <input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/> Conf. Screen			
Letters <input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/> Duties/Supp			
Objections			
Video Receipt			
<input checked="" type="checkbox"/> CI Report			
9202			
Order <input checked="" type="checkbox"/>			
Aff. Posting			
Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 05/23/14
			Updates:
			Recommendation:
			File 15 - Alaniz

16 Lisa Vilayvanh, Tommy Vilauvanh & Candy Vilayvanh (GUARD/P)

Case No. 14CEPR00269

Atty Jaramillo, Brendi (pro per – sister/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Lisa, 17		<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>BRENDI JARAMILLO, sister, is Petitioner.</p> <p>Father: DECEASED</p> <p>Mother: DAVIENG VILAYVANH – <i>Consent & Waiver of Notice filed 04/29/14; Personally served on 05/04/14</i></p> <p>Paternal grandparents: DECEASED</p> <p>Maternal grandparents: DECEASED</p> <p>Siblings: JERRY VILAYVANH, ROSIE VILAYVANH, PETER VILAYVANH, SANGNAPH VILAYVANH, TONY VILAYVANH, JOHNNY VILAYVANH – <i>Personally served on 05/04/14</i></p> <p>Petitioner states that the children need a stable, permanent home. Petitioner states that the children were moved a lot and had to change schools while in their mother’s care.</p> <p>Court Investigator Samantha Henson filed a report on 05/20/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Tommy, 12				
Candy, 10				
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			w/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: JF</p> <p>Reviewed on: 05/23/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 - Vilayvanh</p>		

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 9		<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:	
		<p>LINDA HERNANDEZ, maternal grandmother, is Petitioner.</p>		<p>1. Need <i>Notice of Hearing</i>.</p>	
		<p>Father: RALPH GONZALES</p>		<p>2. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p>	
Cont. from		<p>Mother: MICHELLE HERNANDEZ</p>		<p>a. Ralph Gonzales (father) – personal service required</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			<p>b. Michelle Hernandez (mother) – personal service required</p>	
<input checked="" type="checkbox"/>	Verified	<p>Paternal grandparents: DECEASED</p>		<p>c. Joseph Hernandez, Jesus Hernandez, Marina Hernandez, Saralinda Gonzales (siblings) – service by mail sufficient</p>	
<input type="checkbox"/>	Inventory	<p>Maternal grandfather: DECEASED</p>			
<input type="checkbox"/>	PTC				
<input type="checkbox"/>	Not.Cred.				
<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>	<p>Siblings: JOSEPH HERNANDEZ (22), JESUS HERNANDEZ (15), MARINA HERNANDEZ (17), SARALINDA GONZALES (13), UNIQUE GONZALES (11), MICHELLE GONZALES (10), RALPH GONZALES, JR. (8), MARLA GONZALES (6), MOLLY GONZALES (6)</p>		
<input type="checkbox"/>	Aff.Mail	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>			
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>			
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	Conf. Screen	<input type="checkbox"/>	<p>Petitioner states that the mother is incarcerated and the father is unable to care for the minor.</p>		
<input checked="" type="checkbox"/>	Letters	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Duties/Supp	<input type="checkbox"/>			
<input type="checkbox"/>	Objections	<input type="checkbox"/>	<p>Court Investigator Julie Negrete filed a report on 05/20/14.</p>		
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	CI Report	<input type="checkbox"/>			
<input type="checkbox"/>	9202	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Order	<input type="checkbox"/>			
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>			
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	UCCJEA	<input type="checkbox"/>			
<input type="checkbox"/>	Citation	<input type="checkbox"/>			
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>			
				Reviewed by: JF	
				Reviewed on: 05/23/14	
				Updates:	
				Recommendation:	
				File 17 - Gonzales	

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 49	<p align="center">NO TEMPORARY REQUESTED</p> <p>PATSY A. LYNN, mother is petitioner and requests appointment as Conservator of the person, medical consent powers.</p> <p>Capacity Declaration – Needed</p> <p>Petitioner states: the proposed conservatee suffers from Schizophrenia and is Bipolar. He also has a learning disability. The proposed conservatee needs assistance to make sure he takes his proper medications. He gets confused easily and has wondered off on his own. He is unable to know the date and time of day. He is unable to perceive or appreciate danger and is unable to use public transportation. The proposed conservatee is unable to make his medical decisions. He needs assistance with his financial needs and can easily be taken advantage of.</p> <p>Court Investigator Samantha Henson's report filed 04/17/2014.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 04/28/2014 states the petitioner is directed to speak with Court Investigator Samantha Henson forthwith.</p> <p>The following issues remain:</p> <ol style="list-style-type: none"> 1. Need Capacity Declaration. 2. Need Notice of Hearing. 3. Need proof of service at least fifteen (15) days prior to the hearing of the Notice of Hearing with a copy of the Petition for Appointment of Conservator for: <ul style="list-style-type: none"> • Robert Delenor Lynn (Father) • Richard Lynn (Brother) 	
Cont. from 042814			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			x
Aff.Mail			x
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.			
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
✓ Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
✓ Citation			
FTB Notice			
		<p>Reviewed by: LV</p> <p>Reviewed on: 05/23/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 18 - Lynn</p>	

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

		NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS: 1. Need Citation. 2. Need proof of personal service of Citation with a copy of the petition at least 15 days prior to the hearing pursuant to Probate Code §1824 on Proposed Conservatee Joe Mendoza Cervantes. 3. The proposed Conservatee receives veteran benefits. Therefore, notice to the Office of the Veterans Administration having jurisdiction over the area in which the court is located pursuant to Probate Code §§ 1822(d) and 1461.5. 4. Need video receipt pursuant to Local Rule 7.15.8.A. 5. The Court may require clarification regarding Petitioner's answer to #16 of the Confidential Conservator Screening Form.
		HEATHER MARIE ROSWELL , Daughter, is Petitioner and requests appointment as Conservator of the Person with Medical consent powers and with dementia medication and placement powers.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt	X	
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation	X	
	FTB Notice		
		Voting rights <u>NOT</u> affected A Capacity Declaration was filed 4-22-14. Petitioner states she had been her father's live-in care provider since 2010 due to his dementia diagnosis, including cooking, managing doctor appointments, providing transportation, paying bills, etc. Care has been increasingly difficult due to his condition, causing his behavior to endanger Petitioner and her children. He is currently admitted in the hospital and needs a conservator to apply for Medi-Cal and further assist in placement. Court Investigator Dina Calvillo filed a report on 5-21-14.	
		Reviewed by: skc Reviewed on: 5-23-14 Updates: Recommendation: File 19 - Cervantes	

Petition for Appointment of Temporary Guardianship/Conservatorship of the Person (Prob. C. 2250)

Age: 9	<p align="center">TEMPORARY GRANTED EX PARTE; EXPIRES 05/28/14</p> <p align="center">GENERAL HEARING 07/16/14</p> <p>ALMA CORONADO, non-relative, is Petitioner.</p> <p>Father: ROSALIO SANDOVAL, JR. – Declaration of Due Diligence filed 05/21/14</p> <p>Mother: ROXANNE VINDIOLA – currently incarcerated</p> <p>Paternal grandfather: ROSALIO SANDOVAL Paternal grandmother: UNKNOWN</p> <p>Maternal grandfather: ROY VINDIOLA Maternal grandmother: SYLVIA GUZMAN</p> <p>Petitioner states that Alicia has lived with her for most of her life. The mother is now threatening to pick up Alicia. During the one short period when Alicia was not in Petitioner's care she was with the maternal grandmother, during that time Alicia was inappropriately touched by the maternal grandmother's boyfriend and was not sent to school. CPS has stated that Alicia is not to be in the maternal grandmother's care. The mother is currently incarcerated. A maternal aunt has stated that she wants to remove Alicia from Petitioner's care, but Petitioner believes that that aunt is a drug user. Petitioner requests temporary guardianship so that Alicia can remain in her care.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Rosalio Sandoval, Jr. (father) – Declaration of Due Diligence filed 05/21/14 states that he has not seen Alicia since Christmas and it is unknown where he is living b. Roxanne Vindiola (mother) 	
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			x
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			x
<input checked="" type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			x
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order			x
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
Reviewed by: JF			
Reviewed on: 05/23/14			
Updates:			
Recommendation:			
File 20 - Vindiola			

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Age: 10		<u>GENERAL HEARING 07/16/14</u>		NEEDS/PROBLEMS/COMMENTS:	
		SHOUMAN GHAZI TOUFIC , uncle, is Petitioner.		3. Need <i>Notice of Hearing</i> .	
		Father: FAHD GEHAM		4. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of</i> <i>Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:	
Cont. from		Mother: SHADIHA AHMED		c. Fahd Geham (father)	
<input type="checkbox"/>	Aff.Sub.Wit.	Paternal grandparents: NOT LISTED		d. Shadiha Ahmed (mother)	
<input checked="" type="checkbox"/>	Verified	Maternal grandparents: NOT LISTED			
<input type="checkbox"/>	Inventory				
<input type="checkbox"/>	PTC				
<input type="checkbox"/>	Not.Cred.				
<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>	Petitioner states that the minor's father is traveling outside of the country on an emergency trip. Petitioner states temporary guardianship is needed so that he can care for the minor while the father is gone.		
<input type="checkbox"/>	Aff.Mail				
<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	Conf. Screen				
<input checked="" type="checkbox"/>	Letters				
<input checked="" type="checkbox"/>	Duties/Supp				
<input type="checkbox"/>	Objections				
<input type="checkbox"/>	Video Receipt				
<input type="checkbox"/>	CI Report				
<input type="checkbox"/>	9202				
<input checked="" type="checkbox"/>	Order			Reviewed by: JF	
<input type="checkbox"/>	Aff. Posting			Reviewed on: 05/23/14	
<input type="checkbox"/>	Status Rpt			Updates:	
<input checked="" type="checkbox"/>	UCCJEA			Recommendation:	
<input type="checkbox"/>	Citation			File 21 - Geham	
<input type="checkbox"/>	FTB Notice				

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 7		<p align="center"><u>GENERAL HEARING 07/21/14</u></p> <p>MIKE E. SILVA, maternal grandfather, is Petitioner.</p> <p>Father: RICK MARTINEZ</p> <p>Mother: LINDA SILVA</p> <p>Paternal grandparents: UNKNOWN</p> <p>Maternal grandmother: OLGA NIELSON</p> <p>Petitioner states that the mother is homeless, on drugs, and abandoned the minor. Petitioner states that the minor has lived with him for the past 7 months. The mother steals from him and sometimes refuses to leave his home when he asks her to leave. She has threatened to take Josiah with her. Petitioner further states the mother is in an abuse relationship.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>5. Need <i>Notice of Hearing</i>.</p> <p>6. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p> <p>e. Rick Martinez (father)</p> <p>f. Linda Silva (mother)</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			x
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: JF		
		Reviewed on: 05/23/14		
		Updates:		
		Recommendation:		
		File 22 - Silva		

Petition for Appointment of Temporary Conservatorship of the Person (Prob. C. 2250)

		GENERAL HEARING 6-30-14	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Petitioner lists only the proposed conservatee's two daughters that she alleges have taken him; however, according to the Court Investigator's report, the proposed Conservatee has other children also. Therefore, need complete list of relatives within the 2nd degree pursuant to Probate Code §1821(b). 2. Need Notice of Hearing. 3. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on the proposed Conservatee pursuant to Probate Code §2250(e). 4. Need proof of service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on all relatives pursuant to Probate Code §2250(e).
		<p>DEBBIE WALTRIP, Wife, is Petitioner and requests appointment as Temporary Conservator of the Person.</p> <p>Petitioner states the proposed Conservatee was essentially kidnapped by his daughters and taken to Oklahoma and is now listed as a missing person under suspicious circumstances. He is currently without all his daily medications. The people that have taken him are the same people who took him four years ago and were able to coerce him into removing money from his accounts including \$33,000 from his annuity fund. Petitioner requests to be excused from giving notice to the proposed conservatee's daughters.</p> <p>Attached to the temp petition are the Petitioner's marriage certificate indicating that she and the proposed Conservatee have been married since 1989, and also Progress Notes from VA hospital indicating that the proposed Conservatee is under VA care for dementia, other conditions.</p> <p>Court Investigator Julie Negrete filed a report on 5-21-14.</p>	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
<p>Reviewed by: skc</p>			
<p>Reviewed on: 5-23-14</p>			
<p>Updates:</p>			
<p>Recommendation:</p>			
<p>File 23 - Waltrip</p>			

1 Fred Otto Loeffler (CONS/PE)

Case No. 13CEPR00655

Atty Downing, Marcella (for Diane Marie Huerta & Linda Plitt – daughters/Petitioners)

Atty Rube, Melvin K. (for proposed conservatee)

Atty Janisse, Ryan (for Michael Loeffler – son/objector)

Notice of Motion and Motion to Quash Deposition Subpoena for Production of Business Records; Memorandum of Points and Authorities in Support of Motion to Quash.

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u> Notice of Settlement of Entire Case filed 05/21/14</p> <p style="text-align: center;">Confirmed with attorney Summer Johnson on 05/21/14</p> <p><u>Note:</u> This matter was scheduled to be heard in Dept. 502 at 3:30pm.</p>
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed on: 05/23/14
		Updates:
		Recommendation:
		File 1 – Loeffler